





Moving a Customer Under Sub-Contractor Account

As a contractor, you might have a sub-contractor or more set up in your account (e.g; property manager). In some cases, you may need to move a specific customer under their account so you both can manage. Using your **MULTI-SITE MANAGER** feature, you can **MOVE** a customer to a sub-contractor account with just a few short steps.

Please view the steps below to make these changes (e.g: John Smith).

Step 1

Click on the **MULTI-SITE MANAGER**  icon on the upper right-hand side, then **MY CUSTOMERS**. If using a PC, click on the **MULTI-SITE MANAGER**  icon on the upper right-hand side, then **MY CUSTOMERS**.



Step 2

Scroll down to my customer's section and select the **CUSTOMER** name that will be moved.



Step 3

Click on the **THREE-DOT** icon next to the controller name. Select **MOVE CUSTOMER** (e.g. John Smith)

Step 4

Select the sub-contractor account to which you're moving the controller and click **MOVE**.

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The customer is now under a sub-contractor (San Marco Landscapes, Inc.) and both companies can now manage.

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